Contact Note Enhancements

Question & Answer

Training 6/18/2025; 11 am

Q: There is still no way to sort so notes show from newest to oldest in the print template?

A: The sort of the Contact Notes when creating the batched contact note files occurs in the following order:

- o First – Enrollment
- o Second – Provider
- o Third – Date of Visit

Q: Will the batch be in the My Reports section too or only in a task?

A: You can search for previously completed contact note extracts using the Search Batched Contact Notes drop down menu in the Reporting menu.

Q: Where will the cosigner be on the extract- will it be at the end?

A: Notes that are cosigned have additional fields added to the print template on the bottom of the task that include the cosigner and date. The sort of these notes will adhere to the sort order above.

There are two additional fields added the Billing Extracts (all versions) – Cosigner and Cosigned Date. These columns are added at the end of the current extract.

Q: Sometimes providers (assigned to a different agency) need to cosign a note. Will this be possible?

A: The cosigner must be in the same organization as the person requesting the cosignature.